Merak Email Server

Outlook GroupWare Connector User Guide

Version 9.0

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Contents

CHAPTER 1

Introduction

The Merak GroupWare Outlook Connector allows you to synchronize information between your Merak Account and Outlook:

- High stability with extremely low maintenance.
- Small plug-in compatible with Microsoft Outlook versions 2000, XP, 2003 and 2007. But NOT Outlook Express.
- Enables synchronization of Calendar entries, Contacts, Events, Notes, Tasks, Journals and Shared Folders between Outlook and the Merak Server.
- Share information with other Users.
- Automatic synchronization.
- Supports **all** items and entries in Outlook including attachments, folders, vCards, iCalendar, vFreeBusy information, attendees, planning, etc.
- UTF8 support
- Simple, user friendly interface

This manual describes how to install the Outlook Connector and how to set up all the features you may require.

CHAPTER 2

Installation

This chapter describes the installation of the Outlook Connector.

In This Chapter

Pre-requisites

Outlook must be installed on the machine which you want to install the connector, but it should not be running.

Note - that there are times when Outlook appears not to be running but actually is. You can check by look for OUTLOOK.EXE in the Windows Task Manager. If it is listed, you should take steps to close it down.

You should be reasonably confident in using Outlook.

You should have your Merak Account name, password, and hostname at hand - you will need these to configure your account.

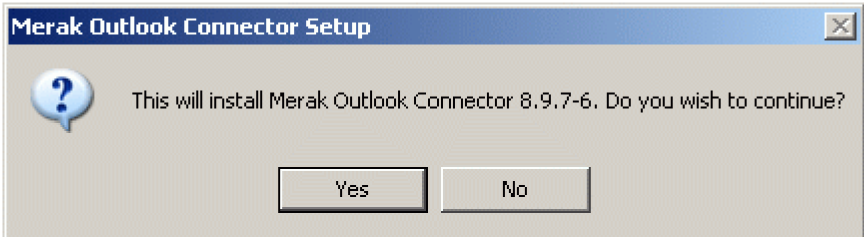
You need to know whether you want to integrate your Merak account into your default Personal Folder or have a new Personal Folder created.

You should have downloaded and unzipped the latest version of the Outlook Connector from the IceWarp website - ***www.icewarp.com.*** http://www.icewarp.com

Running the install

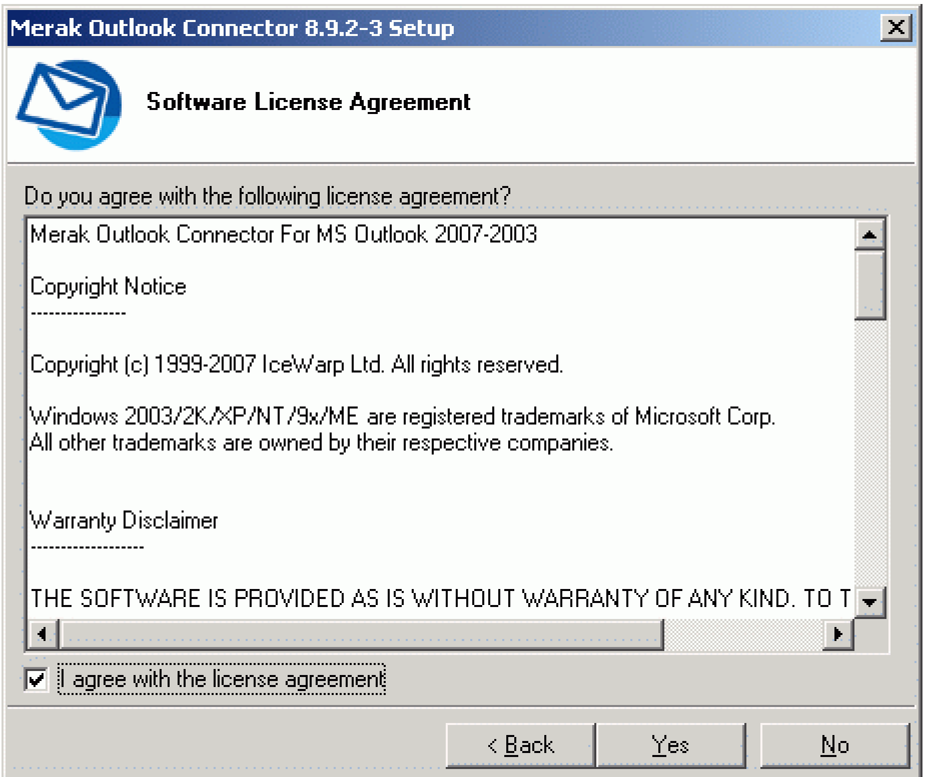
1. In the directory where you unzipped the Outlook COnnector package, double-click the file setup.exe to start the installation process.

The Installation Confirmation dialog will be displayed:



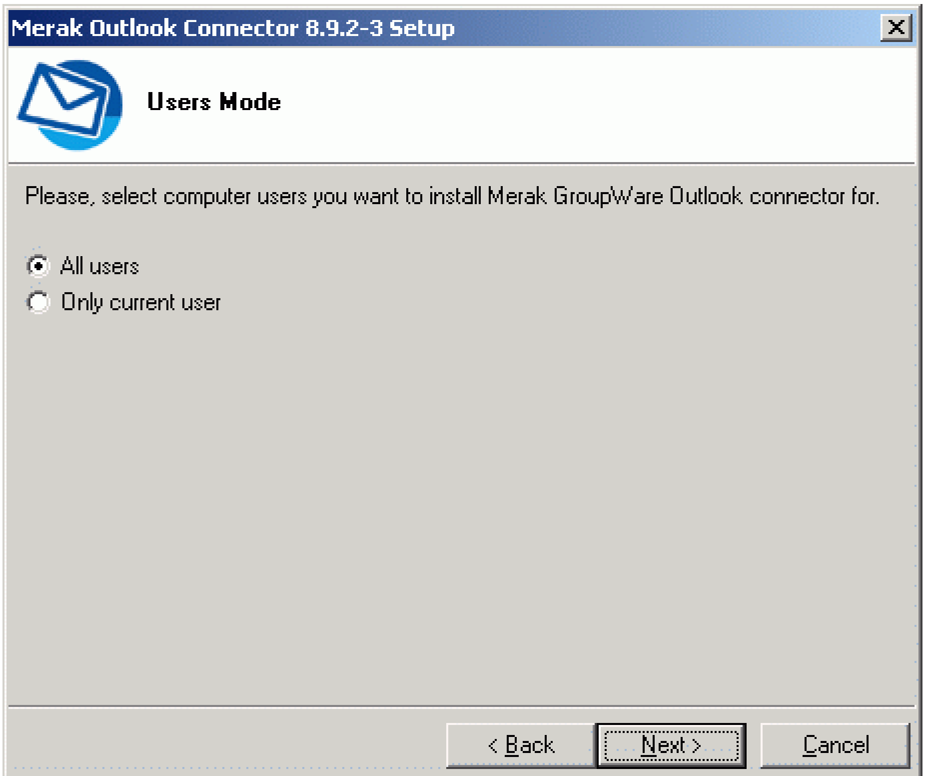
2. Click Yes, The welcome dialog will be displayed:

3. Click Next. The License screen will be displayed:

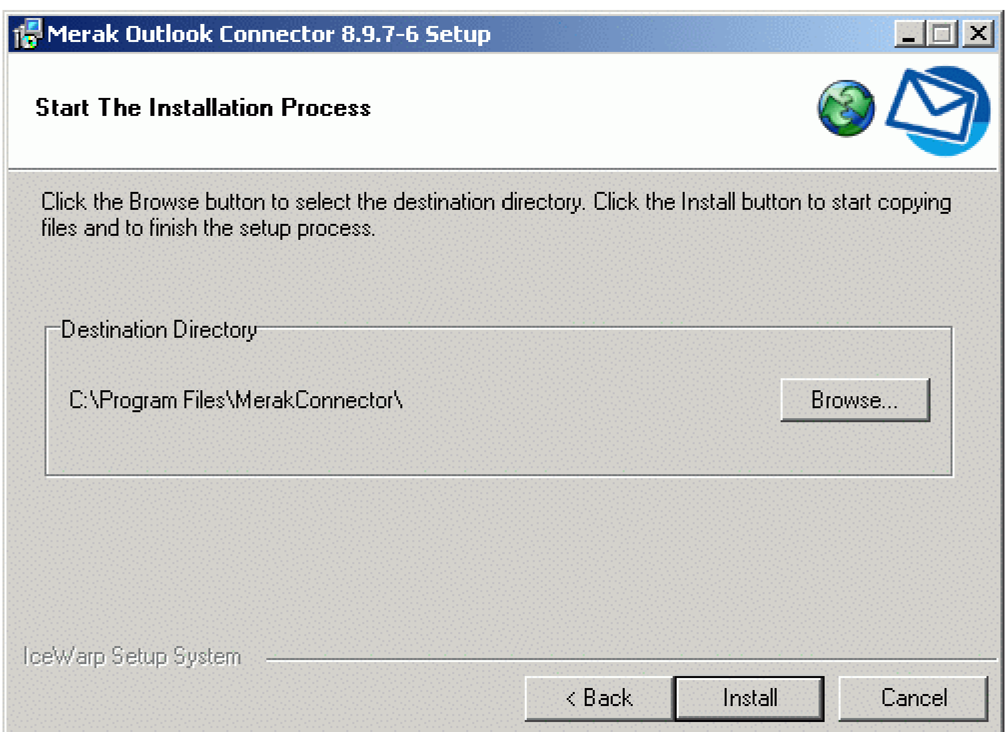


4. Check the box to confirm your agreement to the licensing and click Yes.

The next screen asks whether you are installing the Outlook Connector for All users or just the current user (this refers to Windows users, not Merak Users)



5. Make your selection and click Next. The Program Location screen is displayed:



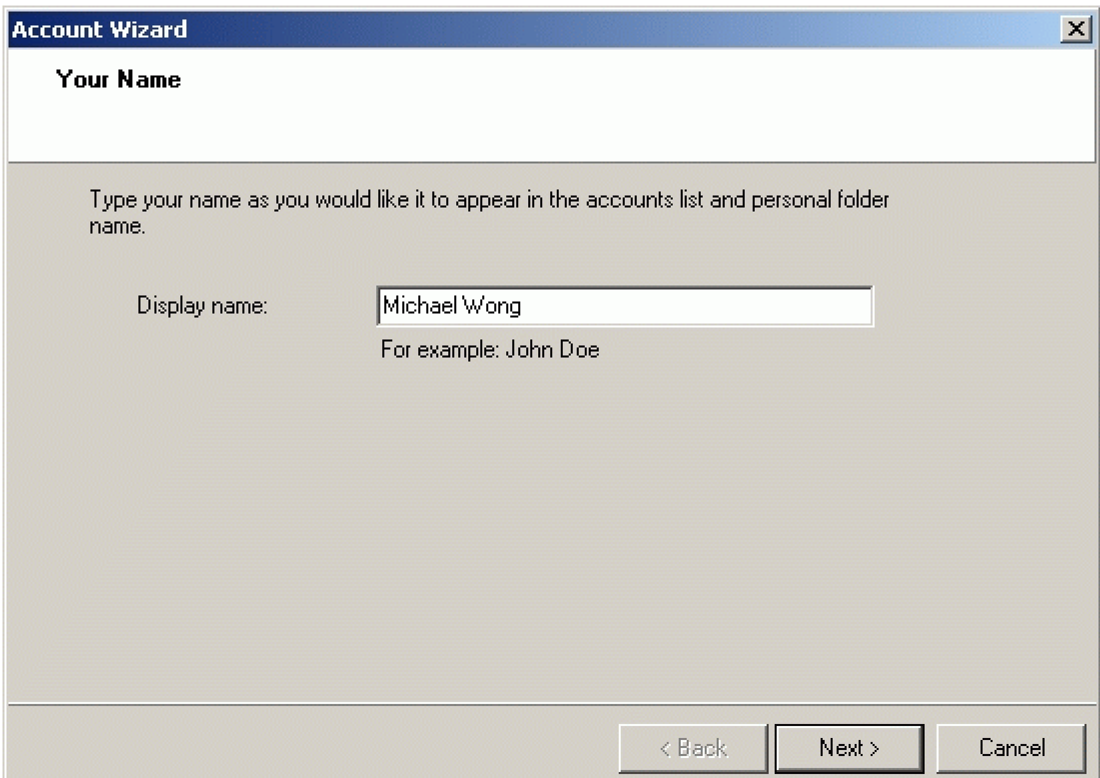
6. This allows you to specify the folder into which the software is installed. Either accept the default or change it by clicking the Browse button. Once you have selected the correct folder click Install.

   At this point, as this is the first install of the Outlook Connector, the Add Account Wizard is executed to gather details of your Merak account to allow the installation to continue.

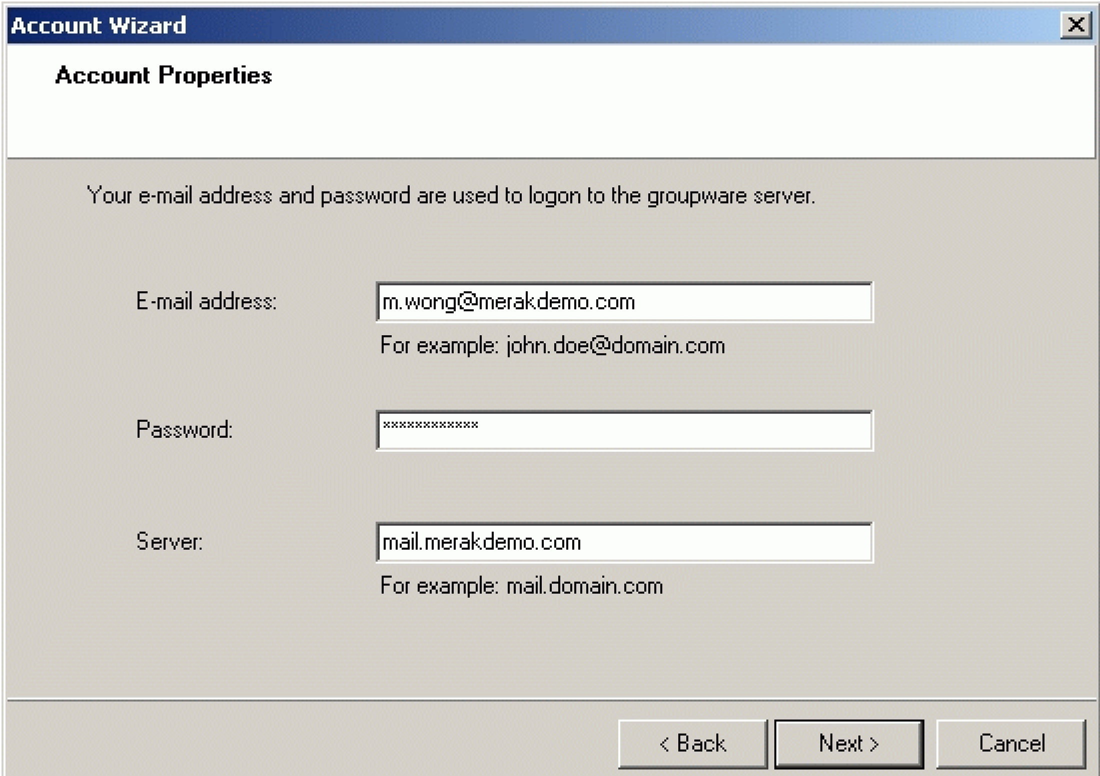
NOTE - After installation is complete, the Add Account Wizard can be invoked directly from Outlook to add further accounts for synchronization.

Add Account Wizard

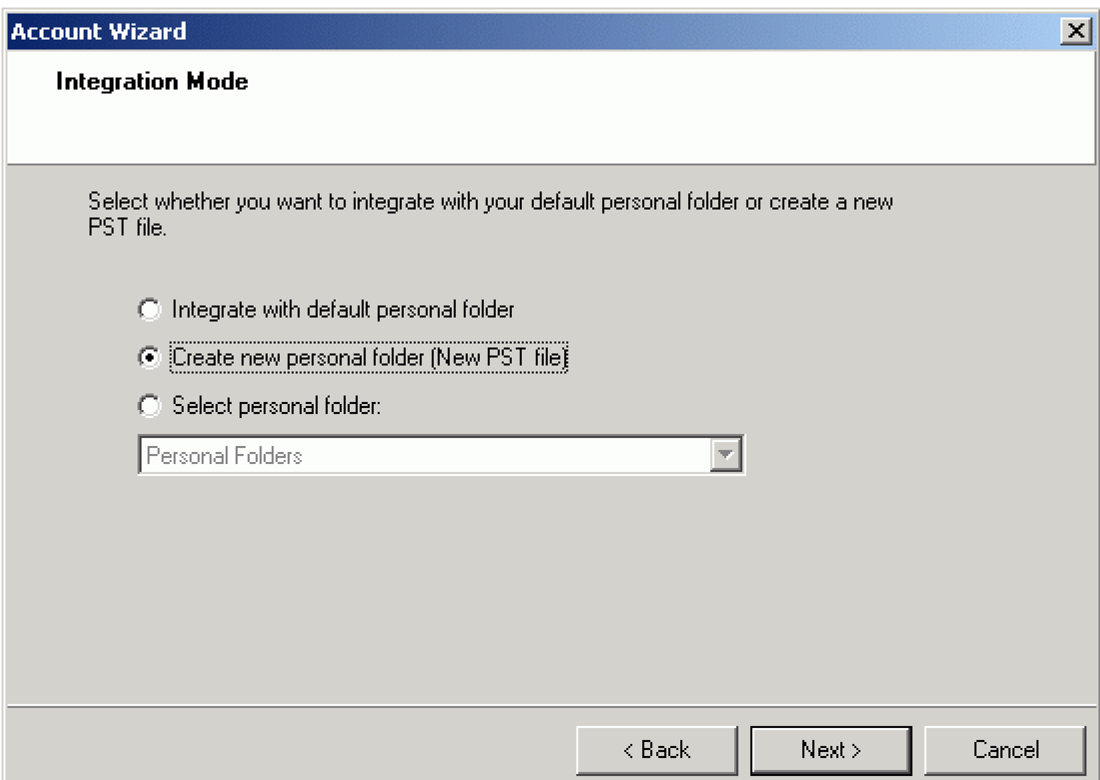
a) The Account Wizard starts:



b) Enter the name you wish to use and click Next.

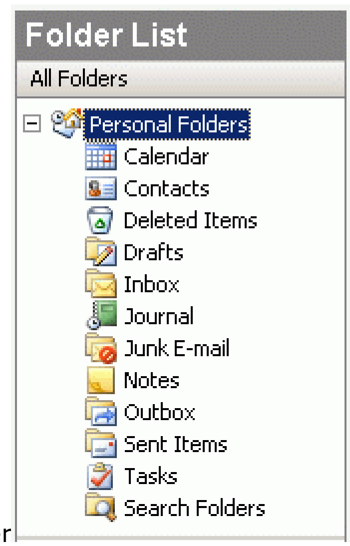


c) Enter the Email address, password and hostname for your Merak Account. Click Next:

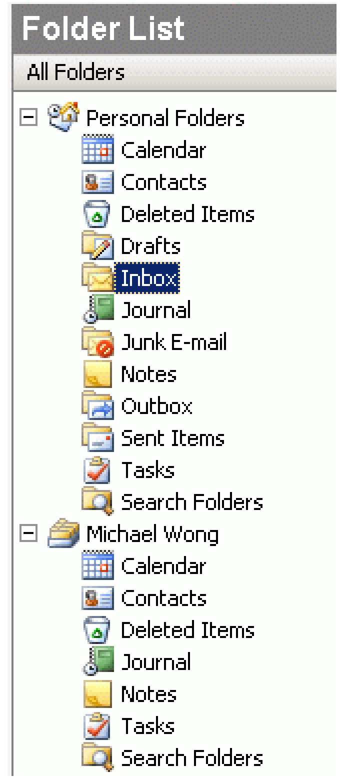


d) Choose which way you want to see your new data - Integrated with your default PST, a new PST, or another PST already in existence. (See the example screenshots below for an idea of what you will get).

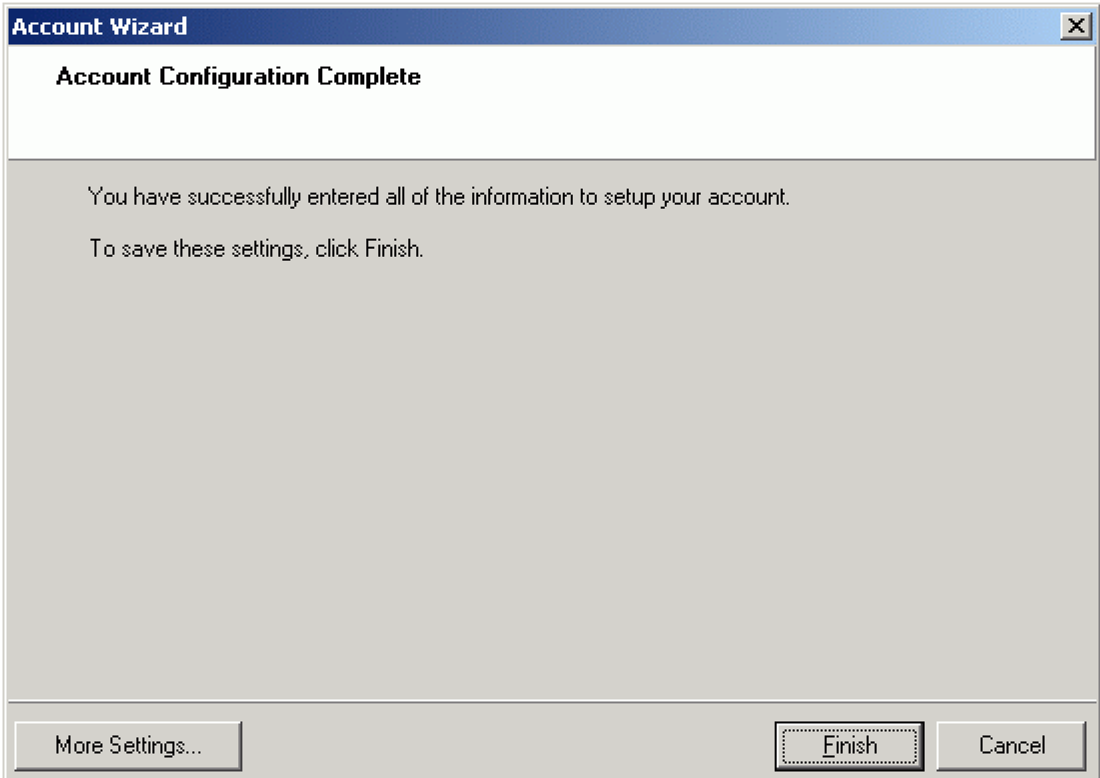
Integrated Folder



vs. new PST



e) Click Next:



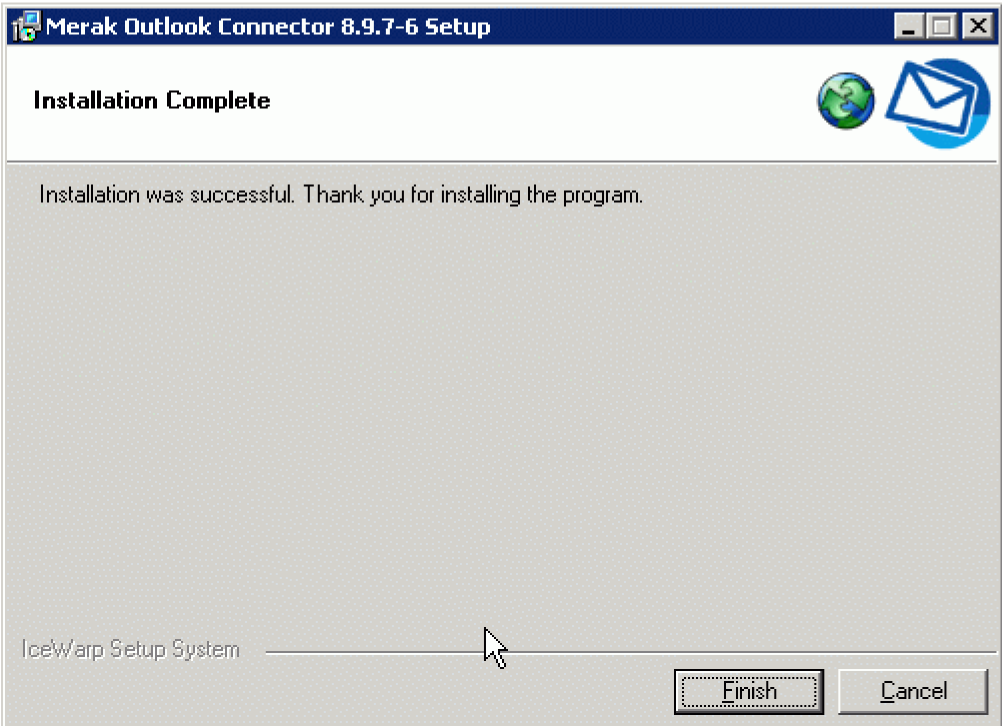
f) Your first account is now configured and the installation can continue:

Click Finish to close the wizard and continue with the installation.

Finalizing the Install

A Progress dialog will be displayed giving you an idea of how complete the installation is.

When the Installation is complete the following dialog is displayed:



Click Finish and your installation is complete.

Using the Connector from within Outlook

This chapter describes how to :

- Change Account properties and add new accounts (see ***here*** (see "Account Tab" on page 14)).
- Share information with other Users (see ***here*** (see "My Friends tab" on page 16)).
- View other users information (see ***here*** (see "Shared Accounts tab" on page 15)).
- Publish FreeBusy information (see ***here*** (see "FreeBusy Appointment/Event Arrangement" on page 21)).
- Automatically Synchronize data (see ***here*** (see "Options Dialog" on page 19)).

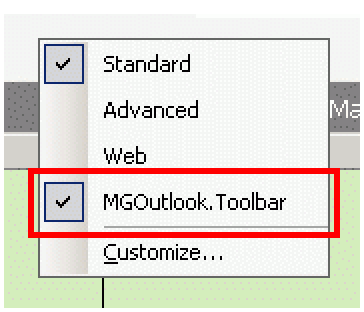
The Outlook Connector Toolbar

When you now start Outlook there will be a new toolbar available - The Merak Outlook Connector toolbar - looking something like this:

If the toolbar is not visible then you should:

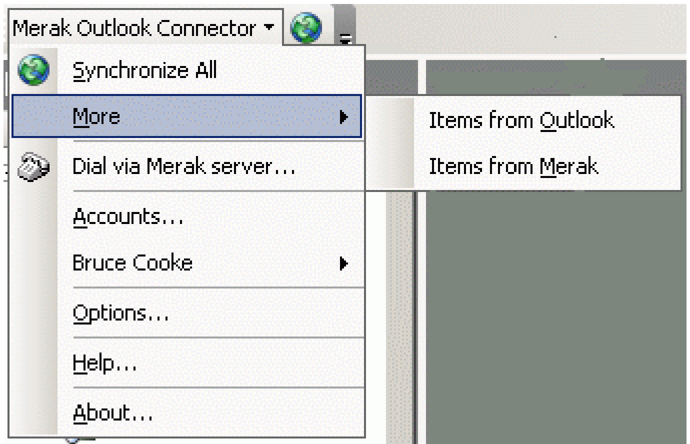
Right-click any blank area of the Outlook Toolbar area.

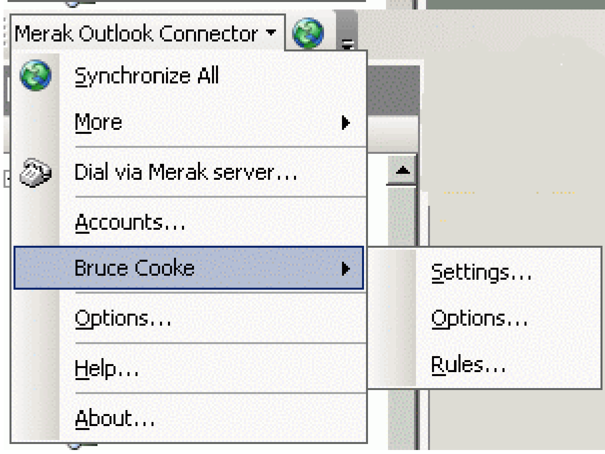
Check the box next to MGOutlook.Toolbar and the toolbar should appear.



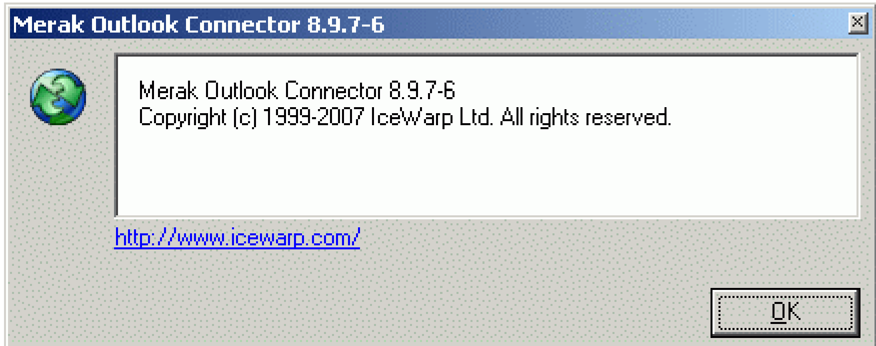
Clicking on the World icon in the toolbar will cause the connector to immediately synchronize all accounts.

Clicking on the Merak Outlook Connector button open a drop down list of options, the following screenshots show the expanded options:



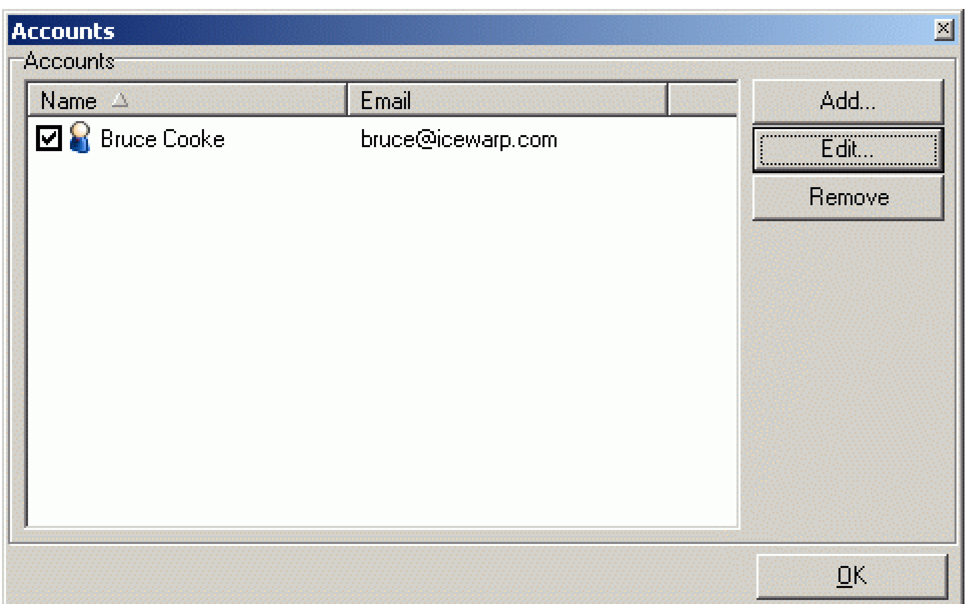


Option	Description
Synchronize all	Select this to have all accounts synchronized immediately.
More	**Items from Outlook** - have have items added or modified within Outlook uploaded to Merak. **Items from Merak** - have have items added or modified within Merak uploaded to Outlook.
Dial via Merak Server	Use this to initiate a call between your SIP device and another (see ***here*** (see "SIP calls" on page 25) for more information)
Accounts	Select this to open the Accounts dialog, discussed here
Bruce Cooke	It won't be this, but all your GW accounts will be listed here. Selecting one opens a sub-list of options: **Settings** - open the settings dialog for the account (see ***here*** (see "Account Tab" on page 14)). **Options** - open the Options dialog for the account (see ***here*** (see "Account Options" on page 25)). **Rules** - open the Rules dialog for the account (see ***here*** (see "Rules" on page 28)).
Options	Select this to open the Options dialog (see ***here*** (see "Options Dialog" on page 19)).

Help	Select this to open a Compiled Help (.chm) version of this manual.
About	Select this option to display version information for the Connector: 

Accounts Dialog

Selecting the Accounts option from the Outlook Connector Toolbar opens the Account Dialog:



All the accounts that you are synchronizing are listed in the main window.

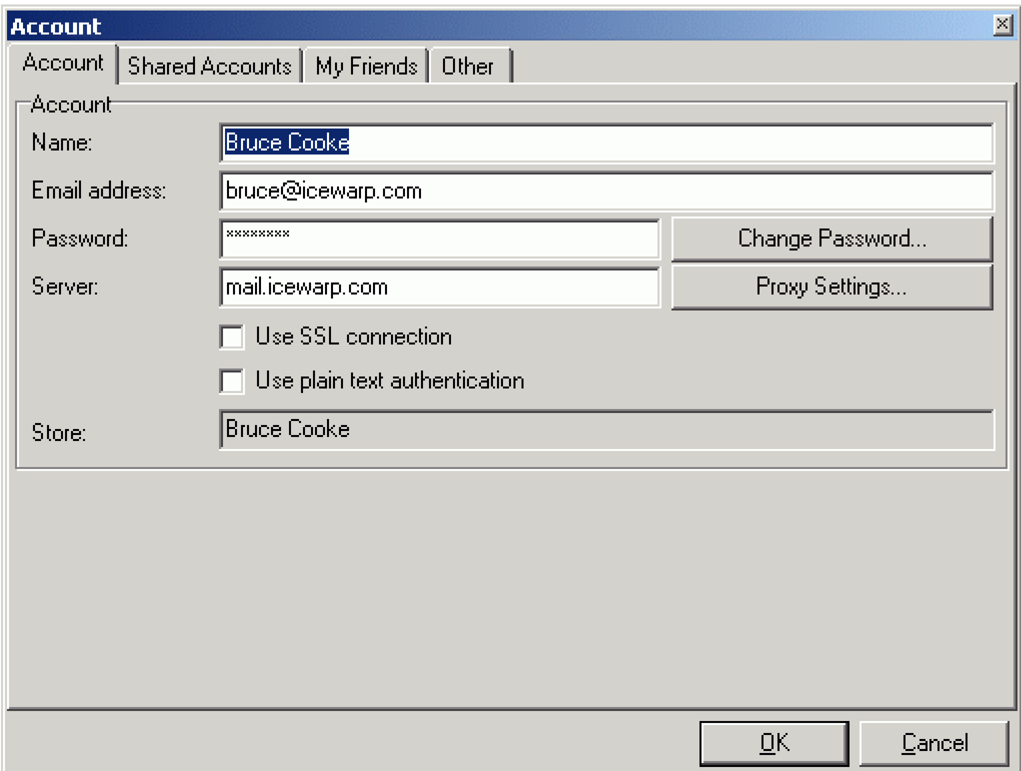
Use the Add button to start the Account Wizard, as described ***here*** (see "Add Account Wizard" on page 6).

Select an Account and press Remove to remove that account from Outlook.

Select an Account and press Properties to open the Account properties dialog, where you can modify the properties set for the selected Account:

Account Tab

The Account tab shows basic connection properties for the account:

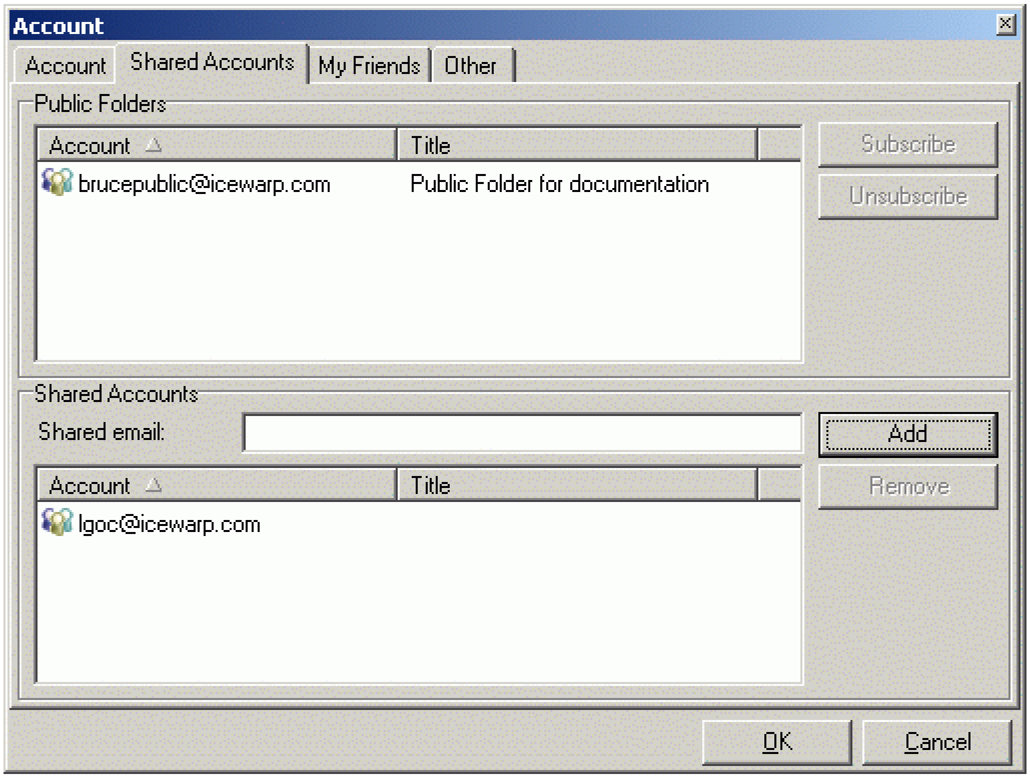


Field	Description
Name	The name of the account, usually the full name of the User. This value is also used as the name of the personal Folder if this account is not integrated with the default folder.
Email address	This is the email address of the Account.
Password	The password to be used to log into this account on the Merak Server.
Change Password	Press this button to open a dialog allowing you to change your account password.
Server	The hostname for the Merak Server hosting this account.
Proxy Settings	Press this button to open a dialog where you can enter your proxy settings if required.
Use SSL connection	Check this option to have the connection secured with a high level of encryption.
Use plain text authentication	Disables the secure authentication process and allows plain-text authentication.

Shared Accounts tab

This tab allows you to synchronize other peoples accounts that have been shared with you.

NOTE - this means that the other user must have defined you as a friend (see ***here*** (see "My Friends tab" on page 16)), effectively giving you permission to access his personal data. See the GroupWare Reference manual for for information.



Any public folders that are defined in Merak for your domain will be listed in the top pane.

Select a folder and press Subscribe to have that folder synchronized.

Select a folder and press Unsubscribe to stop synchronizing that folder.

Shared Accounts are listed in the lower pane.

Enter the email address of an account you wish to share and press add to have that account synchronized.

Select an already synchronized account and press Remove to stop synchronizing that account.

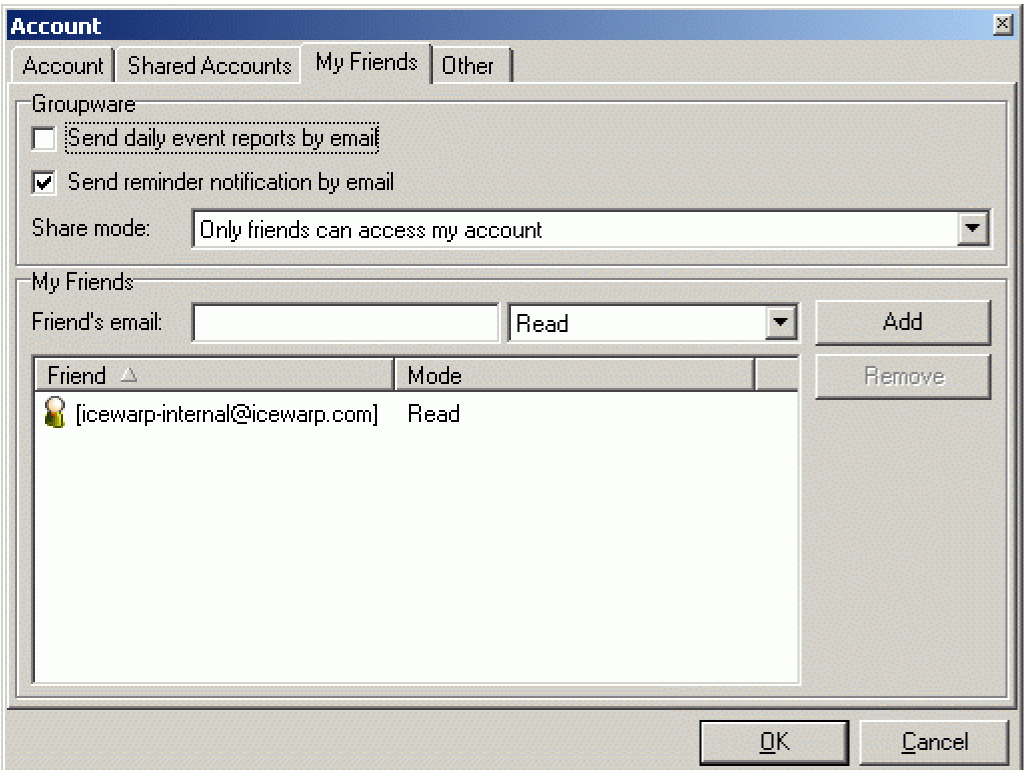
Press OK to close the dialog - new Personal folders will be created, one for each shared Account you added. They will be named as per the email address of the account.

NOTE - in Outlook 2003, the newly created Personal folder might only list Deleted Items and Search folder entries. To correct this and get a full view, choose Go -> Folder List from the Outlook menus

My Friends tab

Here you create a list of Users that can see your personal data, with the level of control they have over that data.

Also defined here is if you want daily emails listing today's events and reminders of upcoming events.

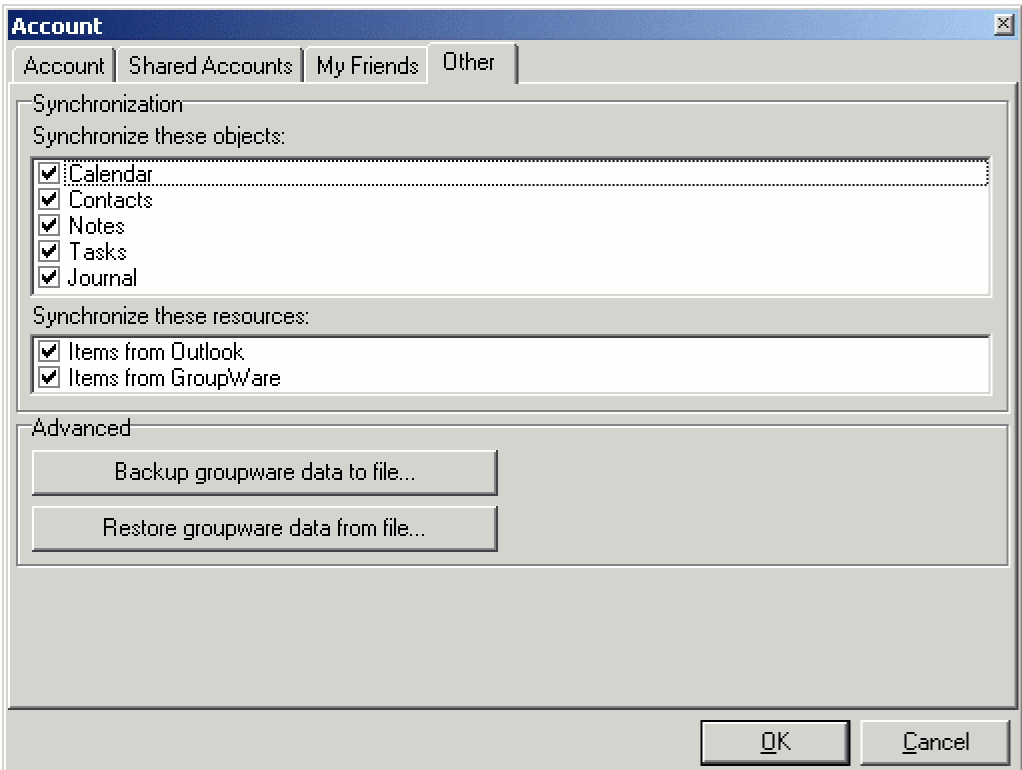


Field	Description
Send daily event report by email	Check this option to have a daily report of events sent to your email address.
Send reminder notification by email	Check this option to have an email sent to you reminding you of upcoming events.
Share Mode	Choose one of three share levels for your folders: **My account is not shared with anybody** Select this option and no-one can see your data. **Only friends can access my account** Select this option to limit access to your data to people defined as "friends" **Anybody can access my account** Select this option if you want to allow anyone access to your data
My Friends	This is where you define your "friends", people who can access your data
Friend's email	Enter the email address of your new friend

Access rights dropdown	Select the access rights that this friend will have: **Read** This friend can only read items. Except items marked as Private. **Read, Write** This friend can read items and create new ones. Except items marked as Private. **Read, Write, Modify** This friend can read and change items, and create new ones. Except items marked as Private. **Read, Write, Modify, Delete** This friend can read, change and delete items, and create new ones. Except items marked as Private. **Read, Write, Modify, Delete, Owner** This friend can read, change and delete items, including items marked as Private, and also create new ones.
Add	Press the Add button to add the new friend. If you want to change the access rights for an already defined friend you should should double-click the friend to populate the email and rights fields, change the access rights and press Add
Remove	Select a friend and press the remove button to have that friend deleted from your list.

Other tab

Here you define what data items you want to synchronize and in which "direction" you want to synchronize them.



Synchronization

Select all the item types that you wish to synchronize

Synchronize these resources:

Items from Outlook - items that have changed in Outlook will be copied to Merak GroupWare.

Items from GroupWare - items that have changed in Merak GroupWare will be copied to outlook.

Checking both of these options causes a two-way synchronization between Outlook and Merak GroupWare.

Backup groupware data to file

Press this button to save all your groupware data to an XML file. A standard file dialog is opened to choose a file to save to. All data is downloaded from Merak and stored in XML format.

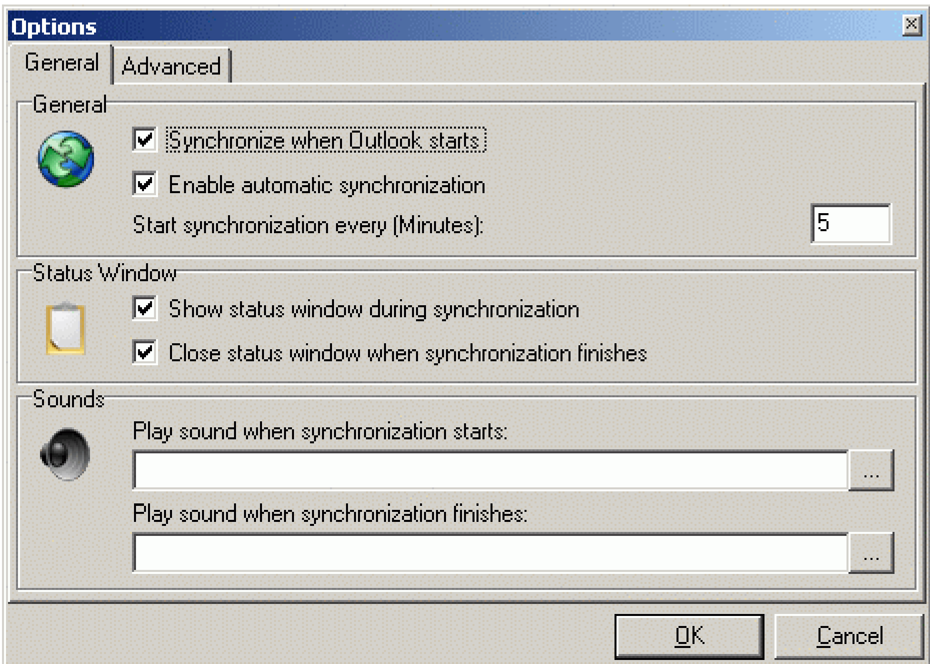
Restore groupware data from file

Press this button to restore groupware data from a previously created backup file

Options Dialog

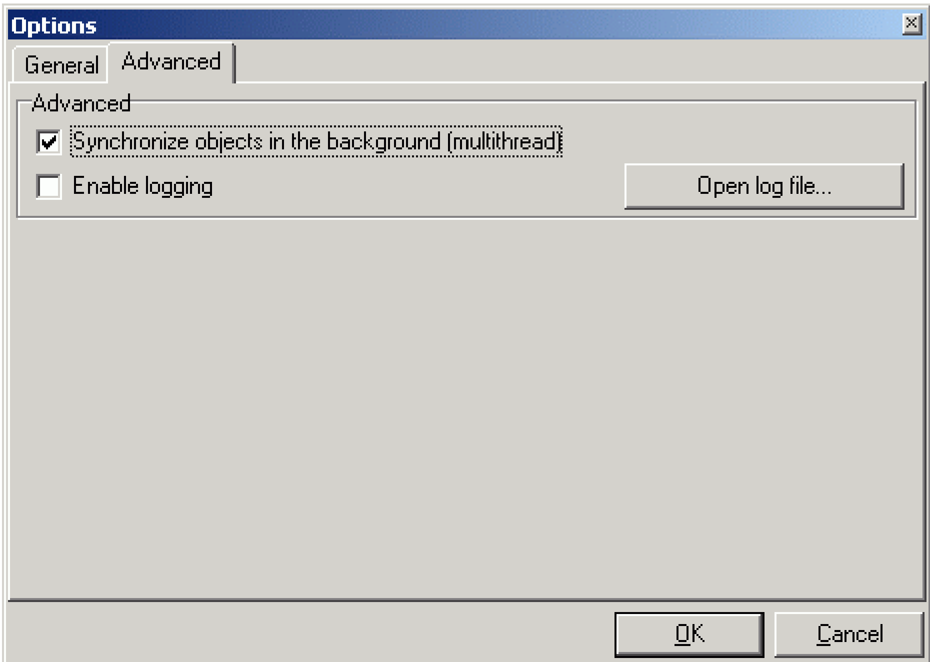
The Options Dialog allows you to set various options to do with synchronization:

General tab



Field	Description
Synchronize when Outlook starts	Check this option to have the connector synchronize with Merak GroupWare when Outlook starts.
Enable automatic synchronization	Check this option to have the synchronization process run at regular intervals.
Start synchronization every (minutes)	Enter a value corresponding to the automatic synchronization interval, in minutes.
Show status window during synchronization	Check this box and a progress display will be shown every time synchronization occurs.
Close status window when synchronization finishes	Check this box to have the status window closed after synchronization (if the status window is enabled).
Play sound when synchronization starts	If you want to hear a sound when synchronization starts, use the '...' button to navigate to a .wav file to play.
Play sound when synchronization finishes	If you want to hear a sound when synchronization finishes, use the '...' button to navigate to a .wav file to play.

Advanced tab



Field	Description
Synchronize objects in the background (multithread)	Check this option and synchronization will be done as a multithreaded process. This is particularly useful if you are synchronizing a lot of data.
Enable logging	Check this option to have synchronization logging performed. Useful if you are having problems that are proving difficult to diagnose.
Open log file	Press this button to open the synchronization log file.

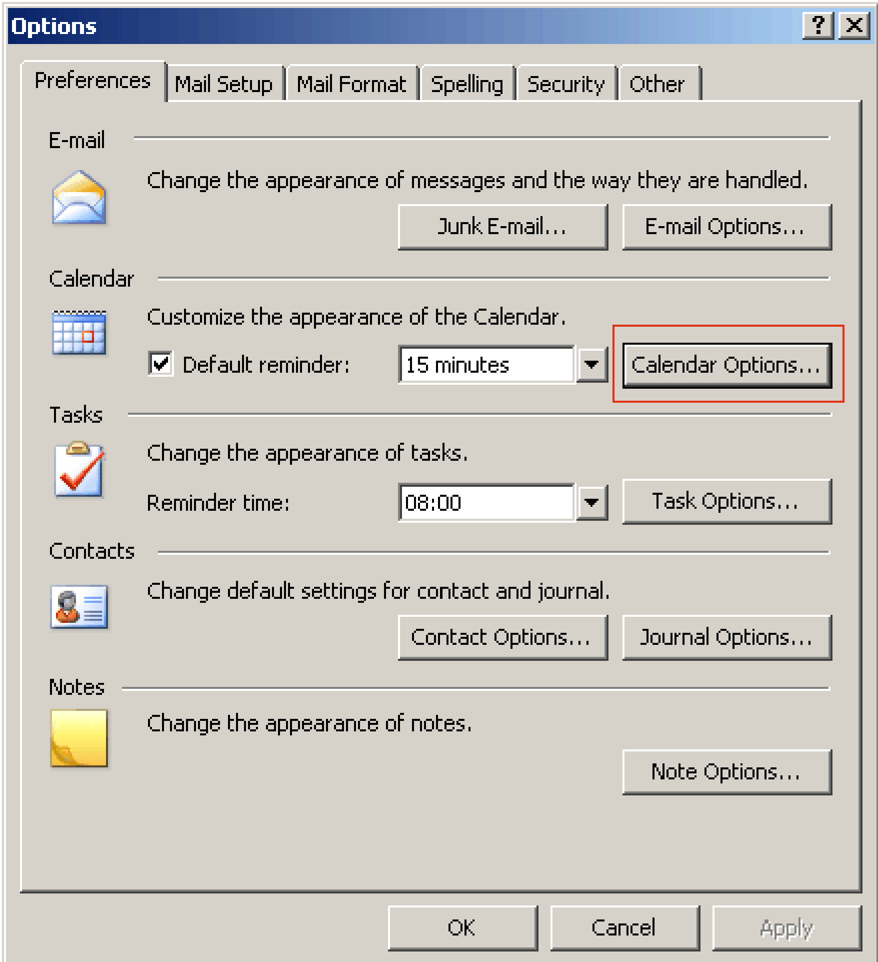
FreeBusy Appointment/Event Arrangement

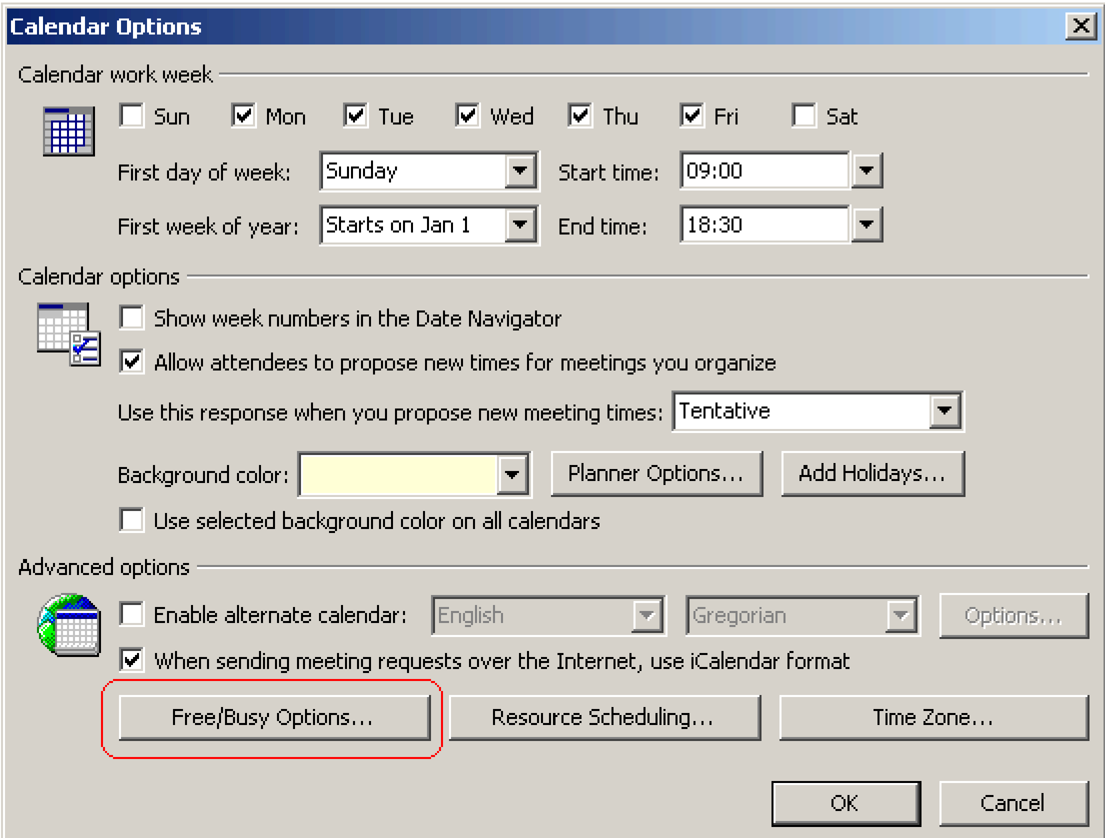
This section describes how to publish your FreeBusy Information, allowing yourself and others to schedule meetings with multiple attendees without causing scheduling clashes.

Setting the FreeBusy Feature for Advanced Appointment/Event Arrangement

1 **To be able to retrieve, view and use other people's free/busy information, first you have to enable the feature in Microsoft Outlook and fill in the correct location on the server.**

2 **On the** Tools **menu, click** Options **and on the Preferences tab, click** Calendar Options**. See the screenshots below.**


Options
Preferences
Mail Setup
Mail Format
Spelling
Security
Other
E-mail
Change the appearance of messages and the way they are handled.
Junk E-mail...
E-mail Options...
Calendar
Customize the appearance of the Calendar.
Default reminder:
15 minutes
Calendar Options...
Tasks
Change the appearance of tasks.
Reminder time:
08:00
Task Options...
Contacts
Change default settings for contact and journal.
Contact Options...
Journal Options...
Notes
Change the appearance of notes.
Note Options...
OK
Cancel
Apply



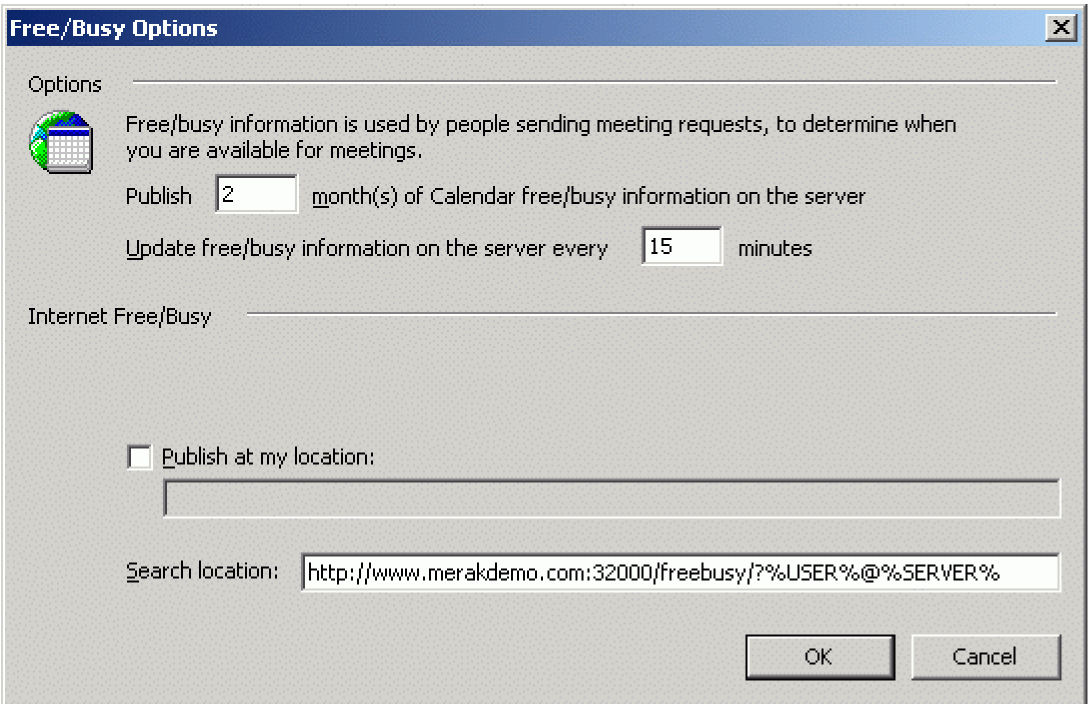
3 **Click** Free/Busy Options**.**

The only option you need to change here is the **search location**. You need to enter the location of your Merak server in the form:

`http://`***hostname:[port]***`/freebusy/?`***%NAME%@%SERVER%***

The hostname is your webserver and the port is the port that your webserver is set to listen on (default is 32000). The variables %NAME% and %SERVER% will be evaluated to the correct email address for your account.

Example - ***http://www.merakdemo.com:32000/freebusy/***?***%NAME%@%SERVER%*** – see below



4 **Do not check the Publish at my location box as the Groupware connector will handle this automatically.**

5 **Click** OK **three times to close all dialog boxes.**

How to plan a meeting using FreeBusy

Return to the main screen in Outlook. For planning a meeting there is nothing really to set manually. Outlook **autodetects the free-busy information** for the people that you invite, and it **automatically inserts their free/busy time periods in the planner**.

1 **Once in the main screen, click** Calendar**, and then click** New Meeting Request **on the** Actions **menu (or CTRL+SHIFT+Q)**

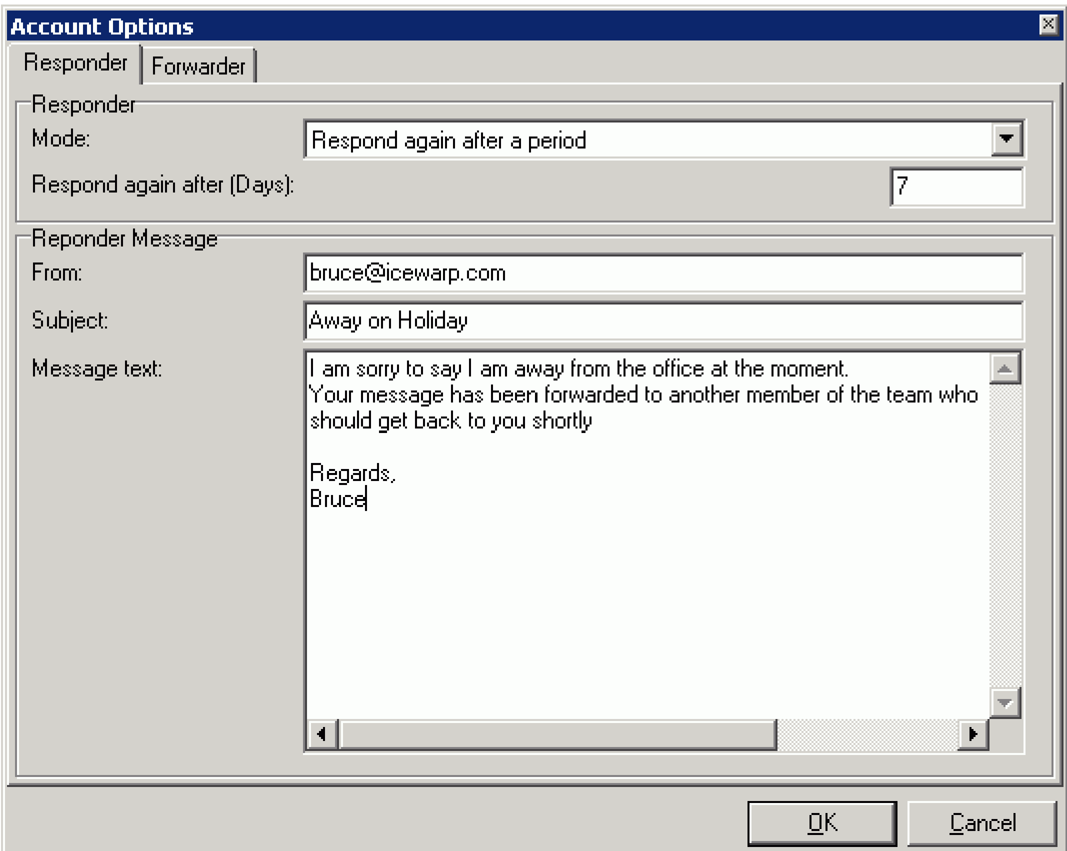
2 **On the second** Scheduling tab**, type the name of each attendee in the** All Attendees **box.**

3 **Outlook will retrieve the free-busy information and display it in the planner, so you see the time periods immediately.**

Account Options

Selecting **options** from the sub-menu of an account opens the Account Options dialog where you can set Responder and Forwarder information for your email account:

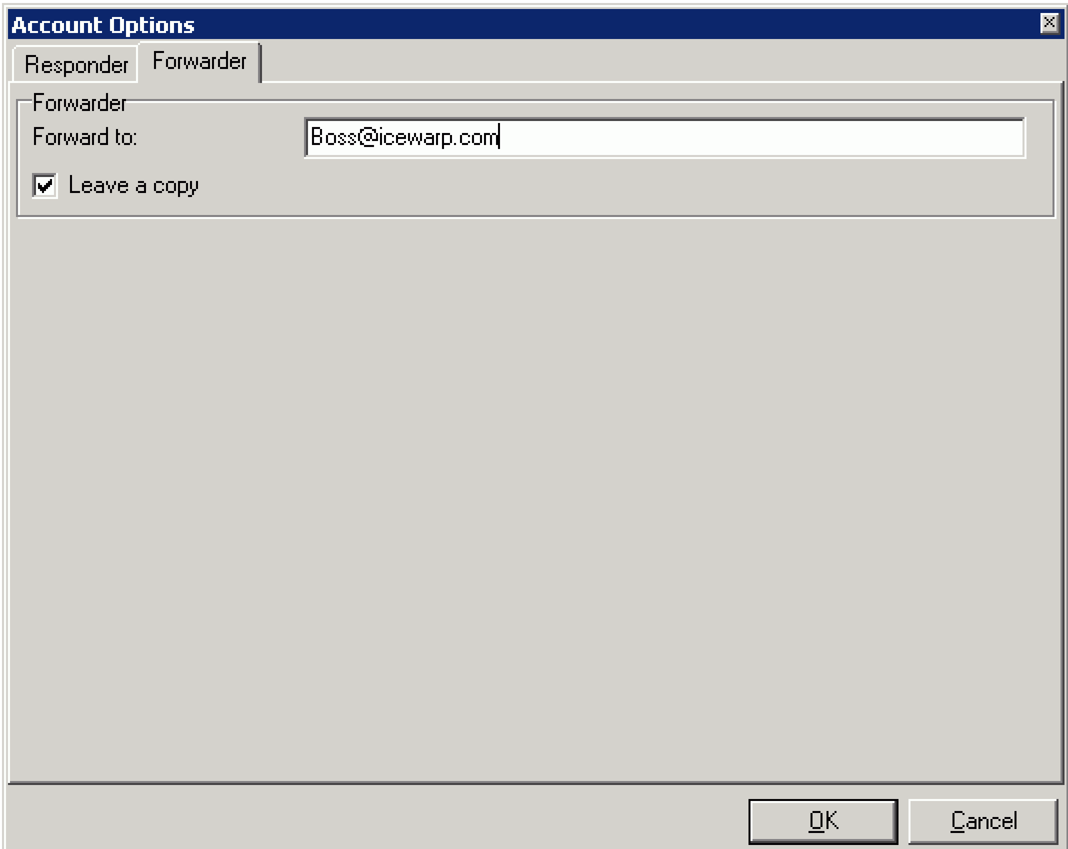
Responder Options:



Field	Description
Mode	Choose a Mode from the drop-down box: **Disabled** No Response is set. **Respond Always** A response is sent for every message that comes in. **Respond Once** A single response is sent to each individual sender of emails. **Respond again after a period** A single response is sent to each individual sender unless another message comes from the same sender after the number of days specified in the next field.
Respond again after (Days)	Specify the number of days after which additional responses will be sent (only valid for the "Respond again after a period" option.
From	Specify a "from" address for your response email.
Subject	Specify a Subject for your response message email.
Message text	Specify some text to be used as the body of your response email

In the example screenshot above a response will be sent from "bruce@icewarp.com", with a subject of "Away on Holiday" and the text shown as the body of the message. This message will be sent once in response to each individual sender, but if that sender sends another message more than 7 days after the first he will get the response again.

Forwarder Options



Field	Description
Forward to	Specify an address to have emails forwarded to.
Leave a copy	Check this option to have a copy of the message left in your inbox.

CHAPTER 3

Rules

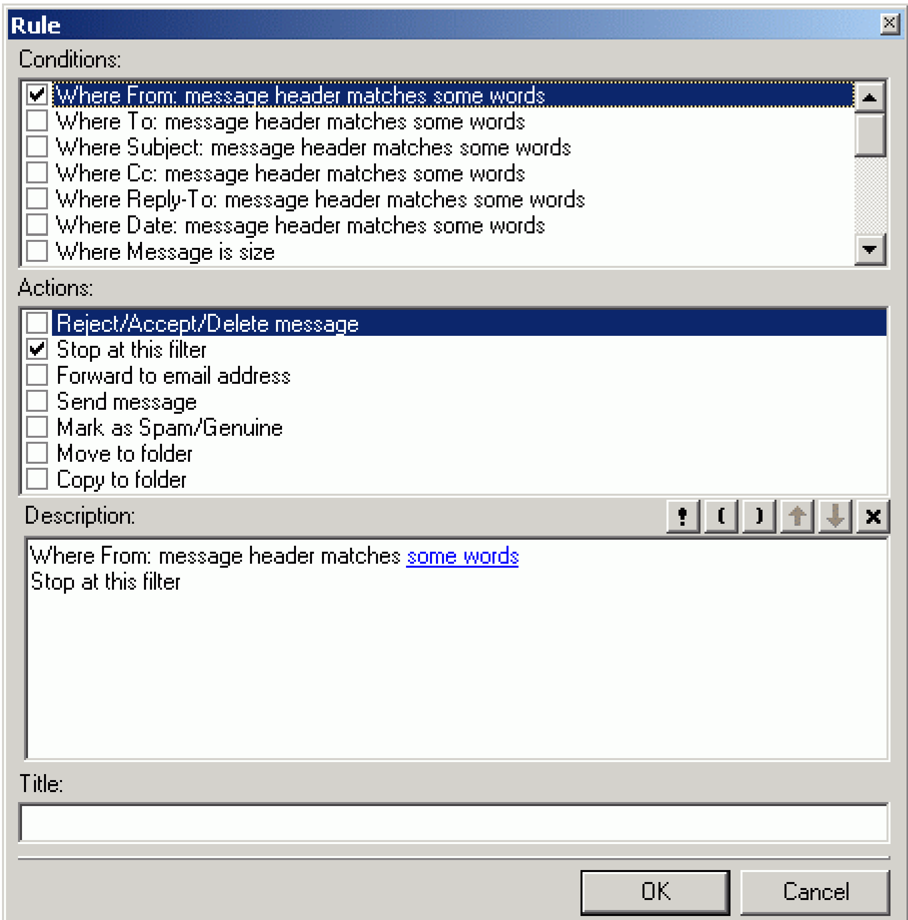
This dialog is the same for all accounts and domains.

Selecting **Mail Service** -> **Rules** or the **Rules** tab with a Domain or User selected will give you access to the Rules list, allowing you to perform maintenance on the rules.

NOTE - that the above graphics may be incorrect depending upon where you are accessing a Rules tab.

The filter is a text file with a strictly defined format. The file can be edited directly using a standard text file editor but we ***highly*** recommend that you use the **Add**, **Edit** and **Delete** buttons as even the simplest mistake can cause valid emails to be rejected.

Clicking on the **Add** or **Edit** button will open a dialog like this, which allows you to define or modify your rule:



The various options, and the **String conditions** dialog, are discussed in detail in the following table but first we will explain basic use of the three sections of the dialog:

The Conditions block

In this area you can select the properties of the message that you wish to perform some test on.

- Multiple conditions can be tested by checking multiple boxes.
- The same condition can be added multiple times by double clicking the Condition when it is checked.

The Actions block

In this area you select the Action(s) that you want to perform on the message if the Rule evaluates as True

- Multiple actions can be selected by checking multiple boxes.

The Logic Buttons

The buttons below the Actions block are used to add logic to the rule

- The Exclamation mark will negate (NOT) the Condition you are currently modifying.

- The open and close brackets buttons will place the corresponding bracket within the rule that you are building.
- The up and down arrows will move the conditions up and down within the rule.
- The X button will delete the current Condition.

We recommend experimentation with these buttons to familiarize yourself with their function

The Description block

This will show the rule you are building or modifying and will change dynamically as you select or de-select Conditions and Actions.

Areas of the rules that can be modified are highlighted in this block and clicking on them will open a further dialog box to allow you to define your test.

Title

The name of the rule, for identification purposes.

Field	Description
Conditions:	There follows a description of the function of each Condition that you can test. **Where From: message header matches some words** Check the From: header for a string Condition. In the rule description click on **some words** to create the string condition (explained below). **Where To: message header matches some words** Check the To: header for a string Condition. In the rule description click on **some words** to create the string condition (explained below). **Where Subject: message header matches some words** Check the Subject: header for a string Condition. In the rule description click on **some words** to create the string condition (explained below). **Where Cc: message header matches some words** Check the Cc: header for a string Condition. In the rule description click on **some words** to create the string condition (explained below). **Where Reply-To: message header matches some words** Check the Reply-To: header for a string Condition. In the rule description click on **some words** to create the string condition (explained below). **Where Date: message header matches some words** Check the Date: header for a string Condition. In the rule description click on **some words** to create the string condition (explained below). **Where Message priority is value** Check the priority of a message. Click on Normal in the Rule description to select a priority. **Where Message is spam** Check if the message has been marked as spam.. **Where Message is size** Check the Message size. Click the 0 kB to select the message size criteria. Select Greater or Lower and specify a Size (in kB) **Where Message body matches some words** Check the message body for a string condition. In the rule description click on **some words** to create the string condition (explained below). NOTE - Use this option with care as scanning the whole message body of every incoming message could seriously affect your Server performance. **Where Custom message header matches some words** Check Custom message Header for a string condition. In the rule description click on **some words** to create the string condition (explained below). **Where Any message header matches some words** Check all headers for a string condition. In the rule description click on **some words** to create the string condition (explained below).

Conditions: (Continued)	**Where Attachment name matches some words** Check the Attachment name for a string condition. In the rule description click on **some words** to create the string condition (explained below). **Where Sender matches some words** Check the Sender for a string condition. In the rule description click on **some words** to create the string condition (explained below). **Where Recipient matches some words** Check the Recipient for a string condition. In the rule description click on **some words** to create the string condition (explained below). **Where Sender's IP address matches some words** Check the Remote IP address for a string condition. In the rule description click on **some words** to create the string condition (explained below). **Where rDNS (PTR) matches some words** Check the rDNS (PTR) record for a string condition. In the rule description click on **some words** to create the string condition (explained below). **Where Spam score is value** Click on 0.0 in the Rule description to define a greater than or less than value to check the spam score against. **Where SMTP AUTH** Check if this message was delivered using an SMTP Authorized connection **Where IP / Sender matches some words** Check the IP and Sender and Recipient for a string condition. In the rule description click on **some words** to create the string condition (explained below). NOTE - that this condition exists for backwards compatibility only and it cannot be used with other conditions **All messages** A special condition that evaluates TRUE for all messages - use with care!

String Condition	Clicking on **some words** (in a new condition) or the string itself (in a condition already defined) will open the **String Condition** dialog box. There are four options available in the dialog: **Function and String:** The Function drop-down box offers 7 options for the string test, the option chosen effects the content required in the **String** text-box **Contains list of strings (semi-colon separated)** Populate the **String** box with a list of strings to test for **Contains string** Populate the **String** box with the string you to test for **Regex** Populate the **String** box with a regular expression **Starts with string** Looks for the string specified in the **String** box at the start of the tested condition **Ends with string** Looks for the string specified in the **String** box at the end of the tested condition **Is string** Tests whether the tested condition is ***exactly*** equal to the string specified in the **String** box **Contains list of strings from file** The **String** box should contain the path to a text file containing a list of strings you wish to test for. Press the "..." button to open a file dialog to navigate to a file where you can specify strings, one per line. **Match case** Check this box to take string case into account. **Match whole word only** Check this box to perform a standard "whole word" check against the string.

Actions:	The following Actions are available when a Condition is evaluated TRUE. Multiple Actions can be selected by checking multiple boxes. Selecting an Action will add the Action to the Description box and for some Actions you are able to click the text in the description to define the Action further. Details follow: **Reject/Accept/Delete message** Adds an Action to Reject (default) the message. Click on **Reject** in the Description area to select Reject, Accept, Delete, mark as Spam or Quarantine **Stop processing more rules** Stop any further Rules from being processed, if this Rule is evaluated as TRUE. **Forward to email address** Forward the message to an email address. Click **email address** in the Description area to specify the email address. **Move to folder** Move the message to a folder. Click on **folder** in the Description area to select the folder to move to.
	NOTE - that you have email delivered to a specific mailbox folder by specifying %%Extension%% as the folder name. When this is specified Merak will look for a folder name within the email address and store the message to that folder if it exists. Example: A message sent to **john:important@merakdemo.com** will be stored in the folder **important** Note the colon used to separate the User alias from the folder name, this can be changed to another character using the API.
	Copy to Folder Copy the message to a folder. Click on **folder** in the Description area to select the folder to copy to.
	NOTE - that you have email delivered to a specific mailbox folder by specifying %%Extension%% as the folder name. When this is specified Merak will look for a folder name within the email address and store the message to that folder if it exists. Example: A message sent to **john:%%important%%@merakdemo.com** will be stored in the folder **important** Note the colon used to separate the User alias from the folder name, this can be changed to another character using the API.
	Encrypt message Check this option to have the message encrypted.
	NOTE -that for this option to work there must be a copy of the User's public certificate located in a file called cert.pem in the User's mailbox folder. The

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